



## Individual Questionnaire – 31 March 2011

Ensure this questionnaire is completed and included with your records

Client Name		Phone:	
Balance Date		Fax:	
		Email:	

To: Sparkes Walker Chartered Accountants Ltd

### **Terms of Engagement**

I hereby instruct you to prepare our Taxation Returns for the ..... year. I undertake to supply all information necessary to carry out such services, and will be responsible for the accuracy and completeness of such information. You are hereby authorised to communicate with my bankers, solicitors, finance companies and all government agencies to obtain such information as you require in order to carry out the above assignments.

You are to represent me as my tax agent. You are therefore authorised to sign any taxation return on behalf of myself or any of my associated entities.

I also accept that Sparkes Walker Chartered Accountants Ltd has the right to charge interest on overdue accounts at the rate of 1.5% per month, and that all accounts are due for payment by the 20<sup>th</sup> of the month following invoice date. The charging of such interest will be at the discretion of Sparkes Walker Chartered Accountants Ltd. I/We accept that any collection costs incurred by Sparkes Walker Chartered Accountants Ltd will be fully recoverable from me/us.

Signature \_\_\_\_\_ Date \_\_\_\_\_

<b>Records Required</b>	✓	Comments
<b>Wages/National Superannuation/Benefits</b>		
Please provide us with the names of any organisations you have received the following from: <ul style="list-style-type: none"><li>▪ Wages</li><li>▪ ACC Payments</li><li>▪ National Superannuation</li><li>▪ Any other benefits</li></ul> In most cases IRD will have sent us these details direct, however we do need to check all details have been included.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
<b>Interest and Dividends</b>		
Please supply the advice slips. <ul style="list-style-type: none"><li>▪ For interest received, you should have an annual advice notice showing the withholding tax deducted. This may be on the bottom of your Bank Statement dated 31 March.</li><li>▪ If any dividends are taken as bonus shares, also include these advice slips.</li></ul>	<input type="checkbox"/> <input type="checkbox"/>	
<b>Rental and Leased Property</b>		
Please complete attached rental questionnaire		
<b>Home Office Expenses</b>		
If part of your home is set aside principally for use as an office/workshop/storage area, please provide the following details:		



<u>Child's Name</u>	<u>IRD No.</u>	<u>Date of Birth</u>	<u>Date left School</u>

**Thank you for completing this questionnaire  
Don't forget to sign it**